Micari Financial determined to help customers with their goals

By MATT HORNICK

Micari Financial Group has been providing Connecticut residents with full service financial products since 1990 and is determined to help all of its customers achieve their financial goals.

What sets Micari apart is it develops individualized financial plans for each of its clients that is best set up to meet their needs. Micari financial planners make a concerted effort to educate clients on the financial concepts being used so that everyone has a clear understanding of what is being done with their money.

Micari provides basic financial tools from its website including a series of calculators that can help with short-term and long-term financial planning. These calculators can help with things such as saving for the kids to go to college or planning for retirement and provide well educated estimates on the funds necessary for these goals based on the client’s current financial circumstances.

The group’s other investments services include investment management, annuities and various insurance products such as life insurance, disability insurance and long-term care insurance. Micari works with businesses as well as individual clients, helping local entrepreneurs set up benefit plans for their employees. The group will devise a proprietary 401(k) program for a company and assist in implementing it and educating all participants on its details. They can do the same with other benefits such as health insurance, dental, life and disability.

The group’s website is also stocked with resources to help anyone better understand their finances. The website’s resources tab has articles, flipbooks, newsletters and videos covering every topic from retirement saving to investment risks to annuities and so much more.

The website also provides real-time information on the stock market and allows users to look up individual stocks or track a market’s change over time.

Founded in 1990, the Micari Financial Group is located at 101 Church Ave.

Online visitors can also request an insurance quote from Micari without even stepping outside. Quotes can be provided for long-term care insurance, group health insurance, life insurance, individual health insurance and disability income insurance.

Founded by Bristol native Bill Marcardi, holds FINRA series: 7, 6, 63, and 65 licenses and insurance licenses through the state of Connecticut. In 2011, he earned the AIF designation from the Center for Fiduciary Studies. The AIF designation certifies that he has specialized knowledge of fiduciary standards of care and their application to the investment management process.

Anyone interested in enlisting the services of Micari can visit www.micarifinancial.com, call 860-261-4746 or visit the office at 101 Church Ave. in Bristol.